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Commentary: Reflections on Being a Professor-in-Residence

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Abstract:

Deciding what to do during a sabbatical is one of the most exciting times for professors. An opportunity to recharge and renew and develop professional skills is an important contributor to staying current and relevant in research and in the classroom. This paper describes a professor-in-residence (PiR) sabbatical experience that was somewhat non-traditional. Instead of visiting an academic institution, a PiR sabbatical involves becoming embedded in a company (in this case, a small software company) and is the flip-side to the executive-in-residence concept popular in many business schools. This paper describes the experience and provides suggestions and insight for professors, hosts, and institutions when considering sabbatical options and how to plan for them.

Keywords: Sabbatical, Professor-in-Residence, Professional Development.

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1 Introduction

Of all the academic career decisions that a faculty member makes, deciding what to do during a sabbatical is one of the most exciting. Sabbaticals—temporary paid leave from a tenured faculty position—were first offered by Harvard University in the late 17th century to provide "renewal" for faculty members (Mamiseishvili & Miller, 2010). Renewal can take many forms, but perhaps the most common involves spending time at a different academic institution in order to enhance creative professional development (Miller & Bai, 2003; Carraher, Crocitto, & Sullivan, 2014). A sabbatical may stimulate future development or simply reward past performance (Mamiseishvili & Miller, 2010). If one desires to experience something new, one can take advantage of their reputation for past performance and use that to open a door for a stimulating a professional development sabbatical. In this commentary, I describe one such option, which those around me came to label as the "professor-in-residence" (PiR). I do so with a four-stage framework that describes the events pre-, during, and post-sabbatical to make it more practical and accessible for those interested in engaging in their own PiR experience or in facilitating the process as an administrator. I end the paper with practical advice on how to create a PiR to assist faculty in getting the most value out of this type of sabbatical.

Academics in business schools are familiar with the "executive-in-residence" (EiR) idea, where an accomplished member of the business community is invited to join the faculty for a period of time. The PiR is the flip-side of the EiR where the academic takes a position in a business firm. Faculty internships (Lantos, 1994), professional interaction activities (Wade, Long, & McGuire, 2006), and university-industry partnerships (Keithley & Redman, 1997) all involve individuals' embedding themselves in a business community, but, in a PiR, individuals embed themselves in a specific company as an employee with responsibilities that come along with such a role. The short-term nature of the position makes the PiR an ideal fit for a sabbatical. Researchers have reported other examples of a technology-based PiR experiences, such as at General Electric (Leavy, 2011) and InfoSys (Indian Institute of Management Calcutta, 2016), and respected MIS professors such as August-Wilhelm Scheer and Barbara Marcolin have successfully combined university and corporate experiences in the past. The company I was invited to join is a information technology company that focuses on developing and marketing point-of-sale software systems for the retail market in North America.

2 Four Key Stages in a PiR Experience

Preparing for and engaging in a PiR has four key stages: 1) initial planning, 2) the first day on the job, 3) the term itself, and 4) leaving the host organization at the end of the term. I describe these stages in Sections 2.1 to 2.4.

2.1 Stage 1: Initial Planning

One needs to plan to ensure a sabbatical regardless of whether one intends to spend time at another academic institution or a business organization. One needs to find a host organization and discuss and agree on terms for the visit with that organization. However, a PiR sabbatical in a business firm differs from other types of sabbaticals in one key sense: when finding a suitable host organization, one needs to consider how, as a professor, one can effectively contribute to the business's operation. I relied on my background as a former software developer with a computer science undergraduate degree to make the case that I understood the intricacies of developing software beyond what would be taught in the classroom. A realistic practical fit between one's professional background and the company being approached is important, and the easiest way I found to articulate the fit was to consider what types of jobs I could do in the company.

This step is similar to job searches overall. Once I formed an impression of the types of jobs that I could do, I began contacting prospective host companies to ask if they would like to discuss a PiR and that I thought I could contribute to their company in specific areas. Among those companies I contacted included iQmetrix (a Saskatchewan-based software-development company) where my friend Scott worked. Prior to taking on his executive role at iQmetrix, Scott was a faculty member at the business school where I now work, which obviously provided much common ground for a conversation. I quote below text from the email I sent to Scott to more or less cold call him with the PiR proposal:

Hi Scott,

I hope you're doing well. I have some sabbatical time coming up and was thinking of options for it. I was wondering if there might be something at iQmetrix that I could be involved in? I'm available starting in June 2015, so 12 months from now, but could move that up to this coming January. From your side this could look something like a project, temp, or contract job because of the short term nature, from my side it would look like a professional sabbatical which some professors, usually business and computer science or engineering, take.

I would be available for 12 to 18 months depending on start date, don't really have any limitation on location or travel, and depending on what you have going on in business development or training there might be a good fit available. Prior to being a professor I worked as a software developer for eight years after getting a comp. sci. degree. Let me know if this sounds interesting and we can continue the conversation.

Chris

While corresponding with other people about potential sabbatical opportunities, the offer to spend the sabbatical working at iQmetrix developed more fully, and, in September, four months before the sabbatical would begin, I made an agreement with the company with a promise that we would discuss the actual assignment details when I arrived.

Since multiple organizations will probably decline an offer to be a PiR, one should develop a list of ten or more potential hosts to contact. The PiR is somewhat non-traditional, so it helps to approach individuals at prospective host companies that have a prior affiliation either through a personal relationship or through a relationship with one's school. I clearly benefited from having a personal acquaintance with Scott and from his being a former faculty member.

iQmetrix Software Development Corporation (hereafter called simply iQ) was founded in 1999 in Regina, Saskatchewan. The company develops and markets a retail point-of-sale (POS) system specialized for the retail cellular telephone industry. The founders were already operating a retail cell phone business in Regina, Canada, and recognized that the complicated payment system between customers, product wholesalers, and regional telecommunication carriers created a need for a simplified office software system for tracking sales, rebates, incentives, and commissions. The company now has the largest market share for retail cellular POS systems in Canada and the United States. When I started my PiR sabbatical in 2015, the company had eight-digit annual revenues, approximately 350 employees (60% developers and 40% non-developers), and operated offices in Regina, Winnipeg, and Vancouver (Canada) and in Charlotte, North Carolina (USA).

One of the factors that attracted my attention was that the company was at a stage in its growth where the corporate strategy was focused on moving into markets with larger enterprise-level customers. As a researcher with a long-time interest in small business growth in information technology companies, I thought the company was at a key transition stage that research has referred to as the control stage (Greiner, 1997) or the growth stage (Scott &Bruce, 1987). In this stage, the organization's operations, which now spanned several time zones in two countries, were testing the management structures and policies developed when the company was still small. Like many tech companies, iQ prides itself on its non-corporate culture where elements such as autonomy, entrepreneurship, and innovation are more important than hierarchy, authority, and rigid planning.

Once one reaches an agreement with a host organization, the discussion should turn to the specific terms of the engagement. Reaching agreement on issues such as roles and expected projects, start and end dates, human resource policies such as union membership, and remuneration is essential to ensure a smooth term. I found it helpful to think of it as a contract engagement where I was a temporary employee. The most important issue was pay and benefits; negotiating a realistic pay level would signal that I had the same responsibilities as other employees, and it provided the extrinsic motivation for me to do good work. Benefits such as healthcare and retirement savings were of secondary importance since the sabbatical policies at my university gave me 80 percent of my regular salary and 100 percent of my benefits while I was away—a clear benefit for iQ.

One issue that required extra attention was managing my home university's rules about what was and was not permitted during sabbaticals. My university has a rule that professors can work during their sabbatical but that the amount of money they make cannot exceed 20 percent of their annual university salary. The pay level eventually agreed on did exceed this 20% but not by a great deal, and I worked out an equitable

resolution with the university administration prior to the sabbatical start date. This situation emphasizes the importance of reviewing the wording and intent of employment contracts and institution policies in advance and discussing possible barriers. The university administration recognized both the novelty and the value of what I was proposing and helped to make the PiR term fit in its policies.

2.2 Stage 2: The First Day on the Job

What I remember the most about my first day on the job was the anticipation of doing something new. My internal voice kept repeating "you're not the professor anymore". I suspect that many academics will assume that "regular people" will find it intimidating to interact with them because they might think that a doctorate degree confers some type of mystical power. I thought it was important to blend in and to look and act like a new employee on my first day. The last thing I wanted was to look, act, or talk like an academic. The benefit of this approach was that it allowed for introductions and conversations to be conducted more naturally because I was just the new guy who happened to also be a professor as opposed to the professor who is always lecturing and evaluating. What I found was that the positive first impressions of being just like everyone else on their first day—including attending a new employee orientation—created the opportunity to interact effectively with my peers. Failing to get past being "the professor" would have presented barriers between myself and my coworkers and decreased the amount of insight I would later be in a position to develop.

> *Professor-in-Residence (PiR) Sabbatical, Day 1. Monday, January 5th. mid-morning, just finished the Human Resources on-boarding process for new employees and signed all the paperwork required to get my IT network credentials and access the corporate network and workspace. I've met with Scott, the senior executive responsible for the region and the individual responsible for championing my sabbatical assignment at this software company. My responsibilities sound straightforward: "You'll be working on commercialization projects for the new software products we're in the process of launching this year. Familiarize yourself with the others and plug yourself into the projects you can best contribute to."*

The most unexpected lesson I learned occurred early in my time at iQ, and it provided no end of comic relief to my spouse. Despite being in reasonably good physical shape, after settling into an academic lifestyle of having a great deal of control over my schedule and work cycle, I found it difficult to complete a full eight hour work day. The problem was not so much the hours but the regimented nature of the office: lunch at noon, afternoon break at 2:30 p.m., finish at 5 p.m. I underestimated the effect of a normal workday schedule and found the first few weeks exhausting. In hindsight, I should have been better prepared for the mental shift of not being in control of my schedule.

One academic habit carried over into the PiR term from the first day: maintaining a professional diary of what I was working on, including dates, times, where meetings were held, who attended, and what was discussed. My work diary combined a normal notebook of the type that my coworkers used for note taking and of a field research diary that I could rely on to recount timelines and contexts. The habit of maintaining a professional diary began originally while I was working on the field research portion of my PhD thesis and it continues to this day. As it turned out, continuing the diary practice while on sabbatical turned out to be fortuitous because I often referred to these notes for reasons I had not anticipated (e.g., completing the after-sabbatical report for my university). The diary also provides useful information for future research projects such as who to contact and what roles they had on what projects.

2.3 Stage 3: The Term of Work

Over the course of my PiR, I worked on three team-based projects (developing an API service commercialization strategy, reintroducing a business intelligence (BI) product, and client contract restructuring). I was also involved in ongoing ad hoc consultations that developed from conversations with coworkers about what they were working on. That sometimes evolved into my providing thoughts and opinions on topics such as developing a customer survey or employee productivity metrics, areas where my research experience was useful.

> *Sabbatical, Day 39. Friday, February 13th. mid-afternoon, I'm just off the phone with Debbie, a colleague in the Vancouver office who I've been working with to develop a pricing strategy proposal for an API [application programming interface] product that is under development. The proposal meeting earlier this morning seemed to go quite well. Directors for Marketing, Development, Infrastructure, Architecture, Sales, and Enterprise Accounts were there and asked*

> *questions. The presentation was relatively brief. Of the 20 different ways to price an API product, only 3 options fit the direction the senior executives want to go. Collecting the data and developing a framework to present the analysis felt quite comfortable. My colleague and I talked about how most of these people have been talking about needing to do this type of structured analysis going forward. Next steps are to work with Marketing to develop a product pitch for the APIs and to work with Architecture on how we can monitor and control others' use of our software.*

Each of the three projects progressed in a similar way. I was told what the general opportunity or problem was (e.g., "our BI product looked promising but didn't get the client uptake we expected; why don't you look at how we could re-launch it?"), then I would ask questions to find out what I could about the issue ("Who is on the BI development team? How is the product priced right now?"), and, finally, I would develop the outline of a plan on how to approach the issue with my coworkers. Overall, the experience was similar to what one might expect working in a start-up company that had become successful and stable but still valued individual initiative and did not yet have formal institutional processes in place for things such as project planning, progress reporting, or product commercialization.

The first project—API service commercialization—required coworkers from the architecture, marketing, and account management development teams to answer four questions: 1) how should we charge for the service (pricing model), 2) how can we control access while encouraging use (user agreements), 3) how do we promote the service (marketing approach), and 4) who should the first six clients be (alpha and beta users)?

The second project—reintroducing a BI product—involved working with a similar cross-functional group to answer four different questions: 1) what does the BI product offer for features, 2) which of our clients would see value in those features, 3) why isn't the product subscription rate higher; and (4) what options do we have for modifying the product or how we present it to customers?

The third project—restructuring the client contracts—was initiated in order to create contracts and user agreements that would work effectively for a multi-system product line. Such a system considerably differed from the current one, which relied on ad hoc modifications of terms for the single POS system that would be applicable when selling new products such as the API service. The project involved answering three questions with my coworkers: 1) what are the common versus product-specific unique terms in our current agreements, 2) what do we need to take into account in terms of product lines and customer groups in the future, and 3) what options do we have for structuring our contracts in a flexible, effective way?

> *Sabbatical, Day 155. Tuesday, June 9th. I've been working closely with Dennis, who was recently appointed to be the client technical representative for the API service, which means he and I are now co-managing the commercialization. Dennis is a pretty smart guy and knows what he's doing, but I think we were both surprised to find out that we were supposed to be working together. The API roll-out is going well so far. We have contracts and user agreements drafted, we're working with the Marketing department on pricing schedules, and the Business Development people have a business partner who is willing to be an alpha test user for the API service. We're making plans to hand off the project to the operations people for them to manage the API service, so my commercialization role in this project is coming to an end. It's time to start looking for another project to plug in to.*

All of these projects used essentially the same approach in organizing and addressing the questions: 1) define the overall problem, 2) find or develop a conceptual framework to organize the problem, and 3) divide the framework into manageable parts that, when individually answered, provided a solution for the original problem. Researchers will recognize this process as the outline of the research process itself—define, conceptualize, and operationalize. I came to see that sharing this process was one of the significant practical contributions I could offer the company as a PiR. The informal consultations during my stay also followed this same pattern. During conversations, I found myself naturally asking coworkers to "tell me more" (define), asking them if a certain approach sounded like it made sense (conceptualizing), and then discussing ways that the problem could be worked on given what the preferred outcomes were (operationalizing). Of course, some coworkers were more interested than others in these discussions due, I think, to how curious we both were about the problem itself.

> *Sabbatical, Day 261. Tuesday, September 22nd. Heading back to the Vancouver airport after presenting the contract framework for a new Master Service Agreement (MSA) covering all the new product lines. Meeting went quite well, 90 minutes, very long by iQ standards but the executive had a lot of questions. The major question was how fast the new contracts could be finalized and start being used (not surprising). This was an interesting project to work on. We*

needed to review all the previous contracts, split out all the common terms, develop product-specific appendices that could be added or taken out as needed by the customer, and verify that the user agreements were consistent with the new MSA and didn't duplicate any terms. I kept using the term "parsimony" when we were first developing the framework, and I think that helped to get us something that is simple, looks adaptable, and has few moving parts. Now that this project is almost complete it's time to start thinking about my last two weeks at iQ.

2.4 Stage 4: Leaving the Host Organization

Eventually, the end of the work term arrives. The off-boarding process is as important as the on-boarding process because, in the last few weeks, people form impressions of what you were able to accomplish. I used this time to meet with different individuals and teams to debrief what I had observed and experienced in terms of what I thought they might not know or that I had a different perspective about. In some situations, I was asked if I would do this debriefing, but, in others, I made the offer proactively. I used this opportunity to provide an extra contribution to the host organization and also to test out working theories I had about the organization that I thought might be worth following up on. These debriefs were great for ending the PiR term because they provided an opportunity to discuss ideas and concepts and to consider options for following up in areas of mutual interest.

3 Lessons Learned During My PiR

I learned many valuable lessons as a result of my PiR. Some of them reinforced what I already suspected, while others were somewhat revelatory. I group these practical lessons into two categories: 1) lessons about becoming an employee (Section 3.1) and lessons about remaining a scholar (Section 3.2).

3.1 Becoming an Employee

3.1.1 Transitioning from Professor to Coworker May Involve Some Difficulties

Making the transition from professor to coworker was something I thought about in the weeks leading up to my first day as a PiR. Being out of the "real" workforce for 15 years, I wondered how I would handle the transition. For the first four weeks at iQ, I worked in a small office with a nice view of a downtown business district and did most of my work somewhat divorced from the open-concept departmental pods that everyone else worked in. A floorplan change then had me moving from a private office (less than 10% of the people I worked with had an office) to sitting in the marketing department pod with eight other coworkers (two of which were former students of mine). What followed was a period of cognitive discomfort on some peoples' parts. I had to get out of the "sage on the stage" or "academic coach" role and my coworkers had to figure out who I was (a real person) and what I was contributing (same as them: I was trying to figure stuff out). Thankfully, a mutual curiosity on both sides quickly opened the door to the normal conversations that go on in an open-concept office and we all became comfortable discussing work, sports, politics, clothes, and where to go for lunch. What I have come to recognize from this experience is how much I had structured my professional life to create "psychological distance" from students. That included everything from having a big desk in my university office where I sat on one side and the students sat on the other to scheduling office hours where I controlled when people could talk to me and what we would discuss.

3.1.2 A Scholarly Approach to Problem Solving Has Practical Value

A widely quoted comment says that "There is nothing more practical than a good theory" (Lewin, 1952, p. 169). I was surprised at times by the response I received to the general research process approach I applied to the work I was doing. As expected, at times, my coworkers did not understand or agree with what I proposed, but almost all recognized the value of taking a rigorous scholarly approach[1] to using a conceptual analysis framework whenever I introduced one. The first and perhaps most impactful example of this was in answering the question about how to charge for an API service, a type of product that the company had never attempted to market before. In true academic fashion, I conducted a literature review that uncovered work on categorizing API revenue models (e.g., Caganoff, 2013). Being able to synthesize the body of work and present a typology that fit the company's requirements was something that most academics routinely

[1] Using the term "scholarly" may bring with it a negative connotation associated with elbow-patched cardigan sweaters and questions of relevance or practicality; however, I encourage readers to embrace the term and what it represents as my coworkers did once I was able to demonstrate the practical value that scholarly thinking can contribute.

do, but it represents a particular skill set that is valuable and, from my experience, in relatively short supply in the business world. Being able to think and perform conceptually and then translate those ideas into concrete operational ideas is an area where an academic can provide substantial value.

3.1.3 You Will Develop New Perspectives on Your Knowledge

My PiR experience changed my cognitive frameworks about my professional experience as both a teacher and a researcher. Two examples, one from the teaching perspective and one from the research perspective, illustrate how being in a dramatically new role shook up what I thought I knew. The first example concerns a new perspective I developed about what it means to be a professor and the second example concerns a new perspective I am developing on a mature topic (i.e., technology adoption in the context of developing commercial software).

When I began my sabbatical, I had already gone through several key phases in an academic career, including defending a thesis and graduating, accepting the first academic position as an assistant professor, getting tenure, being promoted, and changing institutions in pursuit of new opportunities. Though embedded in the academic world, I thought I had a good working understanding of the business community and that I could translate that experience in the classroom and in my research program to create a rewarding experience for my students. However, spending time as a PiR uncovered something I had not noticed before. Even though I made a point of developing practical ties with the business community, I had actually become quite isolated from business people and had an insufficient understanding of what managers do. It was not until I had the opportunity to move out of my comfort zone and interact as an equal with a team of coworkers that I could really understand the complex challenges they were trying to make sense of. It also was not until that point that my coworkers could see the practical research process of defining, conceptualizing, and operationalizing that makes up the core of an academic's skill set. I have come to realize that we make the outcomes of our efforts very visible but not the processes we use to create the knowledge required to achieve those outcomes. When we do open that process up to others, they respond to it in positive ways.

One conversation I had with a coworker emphasizes this point. In an offhand comment, he said he liked several of his professors and had good relationships with some of the more interesting ones but that he never got past the thought that his professors were very transactional and preferred to answer questions and deliver outcomes. He may have an important point. Rather than being a coach, facilitator, or other similar person, I have increasingly begun to think about how the psychological distance between academics and non-academics (students, managers, etc.) can be meaningfully reduced so that experiences become less transactional. In a business world where strict hierarchies, rigid observance of status, and deference to authority are increasingly out of style, it is something of a mystery why the role of professor is so traditional. Only once I went beyond being a professor and became a coworker/team member could the real work and understanding flow.

Being embedded and a part of the day-to-day operations of a software company also led me to reexamine my thinking about adoption, a foundational MIS topic. My framework for thinking about IT adoption was both technology centric (in which characteristics such as IT affordances, diffusion, and market economics influence adoption decisions) and social centric (in which human processes such as appropriation and structuration influence decisions). Depending on the context, I was comfortable teaching, theorizing, or simply discussing explanations and predictions about IT adoption.

After observing and making decisions about what features future software releases should offer, I decided I had been missing something significant: at iQ, people made a lot of decisions that they designed to avoid what I call "the big miss" (i.e., incorporating a new technology or developing a new service that customers do not like, will not pay for, is too expensive, or creates a system legacy that is hard to get out of). A good example of avoiding the big miss is radio-frequency beacon technology, which involves small wireless transmitters that retailers can position in a physical space to serve as close-proximity geo-location services that can communicate with downloadable smartphone software. Retailers are always looking for new ways to attract and interact with potential customers, so RF beacons looked like a potentially important technology. The commercialization problem was not a lack of ideas about how to incorporate the technology into the retail management software because, in the summer of 2015, it seemed that everyone had at least three different ideas. The problem was in selecting the best idea and then worrying if other vendors would come up with something better.

Similar situations occurred with virtual reality headsets, data analytics services such as Microsoft Azure Machine Learning, and personal assistant Siri-style services. Avoiding the big miss created substantial developmental headwinds, which led to a bias toward relatively safe, incremental products as opposed to something revolutionary. My experiences have raised once again a question about adoption that I have had for several years: why don't innovations in new technology develop into commercial products at a faster rate? My previous framework emphasized demand-side explanations based on diffusion rates as the answer. I have since added the "big miss" effect, which influences the supply side of the problem.

3.1.4 Maintain Ties with Your University

During the sabbatical, I found it helpful to maintain normal ties on campus either in person if the PiR is local or through other correspondence if at another location. Because the concept of a working sabbatical is relatively novel, one needs to manage perceptions about it so colleagues will understand that a PiR is a legitimate way to spend a sabbatical. Academic colleagues need to understand that you are being productive and the situation is not some form of a cash grab. At the end of a sabbatical, it is a great feeling to be back among your old friends to tell them about what you experienced and learned from your new ones.

3.2 Remaining a Scholar

3.2.1 You May Need to Rethink the Notion of a Gap Between Theory and Practice

A Google search of "gap between theory and practice" produces hundreds of thousands of posts, articles, and jokes, but I have come to wonder about the actual size of the gap. One example particularly comes to mind. In the early stages of working on a reboot strategy for the BI product, we talked with sales people and customers to understand who subscribed to the service, who canceled subscriptions and when, and who kept using it and why. Our results suggested that, if a client believed that there was new information they could actually learn from using the tool and if there were people in the company who could use it (BI required specific skills in reporting and data analysis), then companies were more likely to subscribe and stay subscribed to the service. These results are closely aligned with a popular MIS theory of adoption.

This outcome sounds as close to usefulness and usability that I might see outside a behavioral lab. Making these connections provided a language and logic for the team to discuss what we might do to demonstrate the value of the service and who we should focus on demonstrating that value to. Other examples of good alignment between practice and theory involved challenges with growth (practical problem) and various stage theories (Greiner, 1972; Scott & Bruce, 1987) and with developing multi-party, multi-product user contracts (practical problem) and agency theory (Logan, 2000). My experience was that this gap may not be as large as everyone assumes. I found this insight to be important as I prepared for a return to the classroom following my sabbatical.

3.2.2 Getting Permission to Use Company Data for Journal Papers can be Problematic

Being a PiR puts one in the position of having access to proprietary or privileged knowledge. This access differs from the traditional external consultant role because a PiR is responsible for certain outcomes and for the knowledge associated with those outcomes (e.g., revenue figures, product strategies, marketing programs, and so on). Many organizations, iQ included, protect this information from outsiders to prevent competitors from knowing the company's plans in a competitive environment. This situation can present a dilemma because the PiR is in a position to discover interesting problems to research but information about those problems may not be something the host organization wants to make public.

What I did during my PiR term was to discuss explicitly the types of information I could get access to afterward (e.g., anonymized employee survey results) and what was off limits (e.g., customer data). Note that we discussed various ways of anonymizing the data and masking the host company's name but in no cases did these measures provide enough safety to overcome concerns. In retrospect, I agree with the reasons for not getting access to some types of data because, from the company's point of view, the risk of exposing sensitive information is not worth the small benefit (if any) from academic publishing. A "PiR non-disclosure agreement" (NDA) could be developed that balances interests but also goes beyond a typical employee NDA to acknowledge that academics have a responsibility to disseminate knowledge. Frequent discussions in advance about what might and might not be allowed saved me from wasting time pursuing potentially interesting but ultimately unpublishable research.

3.2.3 The PiR Experience Has a Positive Impact on Subsequent Teaching and Research

My primary goal as a PiR was to be a productive member of a company and to help achieve its goals. Considerations for teaching and developing research were secondary. Having now completed this sabbatical and returned to campus, I have found that I am more productive in research and writing than I expected. I published two teaching cases based on iQ while I was there, I completed two intensive revise and resubmits while I was a PiR, and I have begun a new project. I take away two things from the experience that will influence what I will do in future teaching and research.

First, the concept that technology adoption in commercial development and new ventures is influenced by decision makers who try to avoid "the big miss" is an interesting new project to come directly from my PiR experience. I remain in contact with prior coworkers and so have the benefit of being able to pose new questions as they come up. Is this a form of risk management? (I think it is.) Do they see it as slowing down or getting in the way of the development process? (I don't think so.) Are there common heuristics involved in making these decisions? (Not that I've yet seen.) Do people outside of a competitive market environment worry in the same way about the implications of pursuing the wrong innovation? (Perhaps this question generalizes to situations where the decision makers are responsible for both financial benefits and costs.) It took several months of embedded work on commercialization projects before I could see the patterns of behavior leading up to these questions. I doubt I would have noticed these patterns without my direct involvement.

Second, I have revised my conceptual framework of what it means to be a Professor, particularly with respect to the issue of psychological distance between academics and non-academics. Do professors have institutional or behavioral "buffer zones"? (I think so.) Do all professors have one? (I think so, but certainly of different distances.) Are the barriers physical, relational, cognitive, or institutional? (Probably all four and perhaps others as well.) Does it matter? (I think so.) If it turns out that an outcome-oriented "transactional relationship" exists, then perhaps there are ways to change that relationship to create a better learning environment. My PiR experience demonstrated the difference between being regarded as a professor and as a professor who is also a member of the team. My current working theory is that the difference at iQ was that novel problems reduced distance. We all knew what we wanted to accomplish (e.g., explain how the BI service could create value for a customer), and we all agreed who was most likely to be interested (data showed the top quartile of customers based on size who had actively used BI services for at least the last two years were significantly more profitable than others). What we did not know was how to proceed (since rejection of a major product category had not occurred before). This novel problem demanded a constructive work environment at iQ. One can apply this lesson to the classroom. I have now begun to actively experiment with the structure, content, and outcomes of my upcoming classes. The PiR provided new language and examples of what positive outcomes might look like.

3.2.4 You May Experience a Delay Between the PiR and Actual Scholarly Research Output

The question of how research fits in a PiR and just what future research might mean is something one must consider throughout a sabbatical. It is important to consider the work term as just that: a work term in which considerations for continuing with a research program take secondary status in the short term. My experience was that there is little or no time for conducting a research project while working in the primary business role. I thought about forms of naturalistic inquiry or ethnography but dismissed the idea because it would place me back in the role of an academic observing subjects and away from the embedded experience that the PiR was intended to provide.

However, I do not mean to imply that a PiR sabbatical does not provide research opportunities. The PiR can take part in research at the host organization if the PiR's research program happens to match with research the business is already doing. Two particular topics—employee surveys and customer surveys—presented themselves at iQ, In both cases, I met with the people involved in these surveys, and we discussed survey methods and ways to interpret the data. It is also possible to reach an agreement to get access to anonymized data that one can use in future research papers.

The PiR position also facilitates an understanding of the deep structures in the organization. These benefits are invaluable after the sabbatical is over and one initiates new research projects with willing and friendly former colleagues. Academic publishing does not end during the work term: one simply puts it on hold for a short period of time with a practical benefit coming later.

4 Other Perspectives to Consider in Planning a PiR Sabbatical

Building on the lessons I present above, in this section, I focus on an important topic to consider toward popularizing this type of sabbatical activity: setting reasonable expectations with university administration and host organization management about one's responsibilities as a professor. An expanded discussion on this topic is important because, in reality, one has to consider more stakeholders to consider than just the university and the host organization when exploring the option of a practice-oriented sabbatical. University administration, such as one's faculty's dean and university's provost, are responsible for managing the expectations of external stakeholders such as advisory groups, governor boards, and government funding bodies. Host organizations' management are also responsible for managing the expectations of external stakeholders such as their customers, shareholders, and business partners. With multiple stakeholders involved, it becomes important to clearly discuss and set reasonable expectations in advance about what the faculty member is responsible for, and who they are responsible to, during the sabbatical/PiR. In this section, I briefly discuss how one can approach an expectations-setting discussion with both one's university administration and the host organization.

At my university, the provost and the dean strongly supported the concept but emphasized the importance of the practical details. When developing this paper, I asked the provost of my university and the dean of my faculty to respond to the question: "What do you see as the value and potential issues (positive or negative) of faculty taking practice sabbaticals?". Both individuals were aware of the PiR sabbatical and answered from an informed opinion because my sabbatical plans were internally public information. The Dean said:

> *I don't see the program having any negative downside, as long as the faculty member is disciplined in moving research. A PiR facilitates connection to the business community, offering valuable insight, which more often runs the other way in a Business School-Business Community relationship (mentors, Exec-in-Residence, and so). It likely serves best in a professional program, such as engineering, education, and business, but that doesn't dismiss the notion that faculty from areas such as science and arts couldn't generate great synergies with a PiR.*

Similarly, the Provost said:

> *As public funding to universities becomes more and more constrained, we need to articulate with clarity and conviction (and evidence!) the tangible value of sabbaticals not just to us as individual academics, but to the institution and the students—otherwise, we will eventually lose them to cost-cutting. One way of thinking this through is to clarify to stakeholders that sabbaticals are not in any sense leaves, but rather defined periods during which a faculty member's duties change, and typically do not include teaching or supervision of students. The duties shift, but the employment relationship doesn't, and the employer (university) and stakeholders (chiefly government as main funder, and students as sources of tuition and revenues) needs to be able to understand not only the reason for this temporary shift in a faculty member's assigned work, but also the benefits to students and the university of that shift.*

What I interpret from these opinions is their perspective that a faculty member remains a faculty member throughout the sabbatical, which supports the relevance of the above advice about the importance of keeping ties with the university. I recommend that others who follow this path incorporate the information in Sections 3.2.4 and 3.2.4 when setting expectations about what the sabbatical outcomes will be with particular focus on our primary non-teaching activity (i.e., research and publishing).

In terms of host organization perspectives, the earlier point about getting permission to use company information deserves further elaboration because it relates directly to research. The conversations I had with company executive about research and case writing was done in an ad hoc manner simply because we had not thought to discuss expectations in advance. Companies are often reluctant to authorize the release of internal information because of the risks, real or perceived, that making information public could have a negative impact on their own competitiveness and the privacy and confidentiality of their customers, partners, and regulators. One solution to this issue is to discuss publication expectations in advance through a PiR non-disclosure agreement (NDA).

A typical NDA often explicitly states conditions about the confidentiality of information about the host organization and their external stakeholders. Many organizations already have NDAs that could serve as a starting point, otherwise a basic Internet search for NDA templates could also work. The main difference between a standard "corporate" NDA and a PiR agreement involves research expectations in at least two

areas: university expectations for faculty and ownership of IP. A PiR NDA should explicitly recognize the potentially conflicting responsibilities of a professor in terms of their university's wanting information to be public and the organization's wanting it to be private. Based on discussion of this point, a preamble in the agreement could simply acknowledge that a tension might exist and, therefore, that a balance should be struck. Acknowledging a tension in advance provides a starting point for discussion later on if that becomes necessary. The second issue to consider is about the ownership of any new intellectual property that may be developed as a result of the time spent at the host organization. At my university, the formal agreement between faculty and the university is that faculty members are not employed to create IP, and, therefore, the ownership of new discoveries automatically goes to the professor. It is not clear that host organizations will share that same approach or that all universities will have the same IP agreements with faculty members. I recommend to those who purse the PiR to find out what their rights and expectations are as a professor regarding IP and as an employee and represent those expectations in an NDA so that it is clear and explicit in advance. Discussion and flexibility are the keywords here as these recommendations are meant as a framework for discussions. The intention is to make the experience productive for all sides.

5 Final Thoughts on Research in Practice

With the benefit of hindsight, I have been asked two questions about the PiR sabbatical that I can discuss briefly for some final thoughts. The first question is whether I could have planned the engagement in more detail beforehand to better support a research or teaching project. The second question is whether a shorter sabbatical, six months for example, would have yielded the same experience as a longer period such as I had[2]. Since these two questions relate to each other, I discuss the pre-sabbatical planning question first.

Being regarded as an employee and coworker was important to the experience of becoming embedded in the business and culture of iQ; however, one cannot deny that the scholar mindset never goes away. Prior to beginning the PiR, I did spend time thinking about the options I would have for research or teaching projects. One can segregate project ideas into two categories: pre-conceived and emergent. An example of a pre-conceived project was one that I actually completed while at iQmetrix: a teaching case study about the marketing of a new software service that was being launched while I was there. I did not know about the service launch before I started, but, with the idea in mind to look for situations that would make a good teaching case, I recognized this opportunity as fitting a gap in existing case catalogues and made the necessary arrangements to write and publish the case. Knowing generally what I was looking for and having already thought about what would be required to research, write, and publish a teaching case study, it was a relatively time-efficient project to complete and a good example of what pre-planning could accomplish. An example of an emergent project is the "big miss" idea that I describe above. In contrast to the teaching case, working on this project is neither time efficient or straightforward to conceptualize. I did not initially recognize what was going on at first, so it took extra time to conceptualize and theorize before I could begin to understand the processes I was involved with. Overall, my experience was that one can pre-plan for projects and that one should do so because one may have opportunities to combine their own research with a project that interests and benefits the host organization. However, there is also a category of serendipitous projects that I suspect no amount of pre-planning could prepare one for. Efficiently pre-planned work has many benefit, but, for me, it was the serendipity of a new idea to wrestle with that fired my motivation as a scholar.

The question about differences in the length of a sabbatical follow from this discussion of pre-planned versus emergent projects. I had little difficulty proposing, researching, writing, and publishing the case study in the first six months of my PiR mainly because of the pre-planning that I did. The same certainly cannot be said about the emergent opportunities. At the time of this writing, I am still working on conceptualizing and scoping what the "big miss" is, what it relates to, and what its effects are. It took me approximately half the sabbatical to simply recognize that something was happening. Others' experiences would likely differ in this regard, and some may fortuitously stumble on something new when they turn over their first rock in the host organization. It would be interesting and useful to develop new research directions in the MIS field by comparing and developing best practices about practice sabbaticals to at least promote the option and to make the pursuit of emergent unexpected research ideas more readily approachable and accessible to the research community.

[2] I recognize and thank the editorial reviewer for prompting these questions.

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